



E4
CAROLINAS[®]

**Presentation before the
South Carolina Public Service Commission
February 3, 2022**

Commission Docket: 2021-ND-44-E

Participants



John Morrison
President & CEO
E4 Carolinas



Hon. Jeffrey S. Merrifield
Partner & Global
Energy Section
Leader,
Pillsbury Law &
Board Chair



Weston Adams,
Partner & Energy
Practice Group
Co-Chair,
Nelson Mullins &
Board Member



Bryan Stone
President,
Lockhart Power &
Board Member



Bonnie Loomis
Managing Director-SC
E4 Carolinas



The Carolinas Energy Economy



NUCLEAR

Largest concentration of generating capacity in the country & nuclear service companies in the world



HIGHER EDUCATION

More universities with energy education & research than any single state in the country



RESEARCH INSTITUTES

Globally recognized research institutes engaged in energy research



UTILITIES

Largest power distribution company in the country plus a public power generator and more than 100 electric cooperatives

The Carolinas Energy Economy



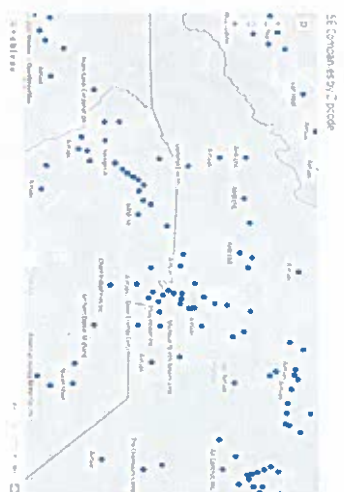
MANUFACTURING

Largest concentration of energy manufacturing companies in the world.



ALTERNATIVE FUEL TRANSPORTATION

Significant automotive manufacturing sector that is moving rapidly toward EV production.



HYDROGEN

One of the top five clusters of organizations with a hydrogen and fuel cell interest in the U.S.



RENEWABLES

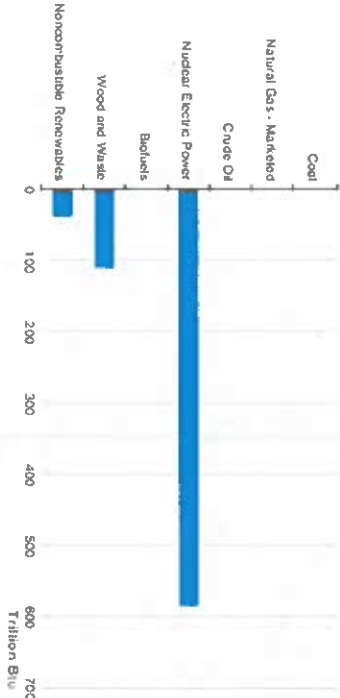
Largest solar energy economy in the Eastern US & world's most-advanced wind-turbine drive train testing facility.



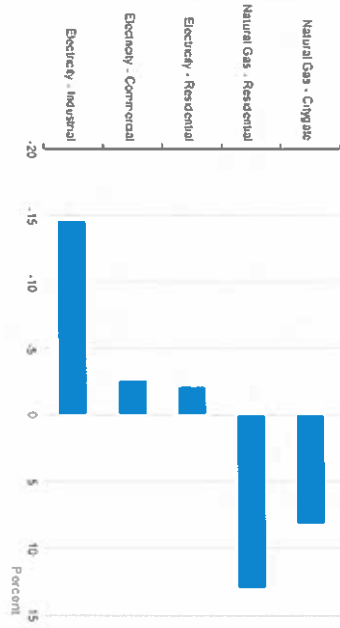
South Carolina: Energy Profile

<https://www.eia.gov/state/?sid=SC>

South Carolina Energy Production Estimates, 2019



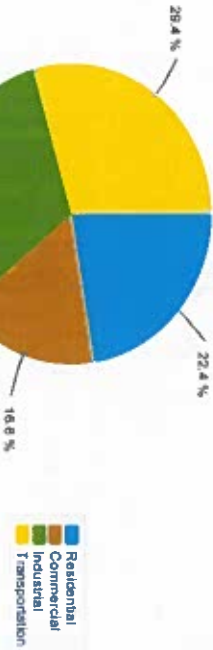
South Carolina Price Differences from U.S. Average, Most Recent Monthly



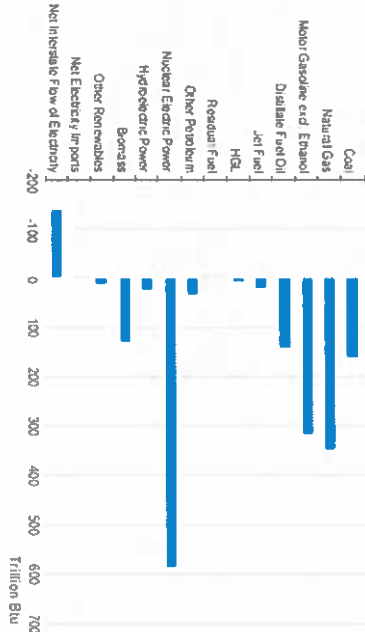
Source: Energy Information Administration, State Energy Data System

Source: Energy Information Administration, Petroleum Marketing Monthly, Natural Gas Monthly, Electric Power Monthly

South Carolina Energy Consumption by End-Use Sector, 2019



South Carolina Energy Consumption Estimates, 2019



Source: Energy Information Administration, State Energy Data System

Source: Energy Information Administration, State Energy Data System

Leading in the Carolinas

Members

140+ member companies in all sectors:

- Utilities
- Service Providers
- Manufacturing & EPCs
- Universities & Research
- Innovators & Start-Ups



Utilities

Members



Service Providers



ACES
excellence in energy

Bradley[®]



H2R

AECOM

K&L GATES



siapartners



Members

Manufacturing & EPCs

Members



TOKAI CARBON TECHNOLOGIES
Global Leader of Carbon Materials



HITACHI

Honeywell



Westinghouse



MasTec



Innovators & Start-ups

Members



PARSONS



TOSHIBA

Leading Innovation >>>

8 RIVERS



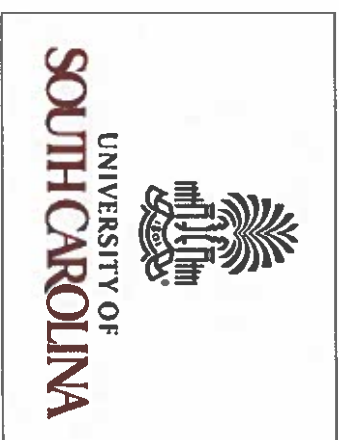
Trilliant



BIRDSEYE
RENEWABLE ENERGY



Universities & Research



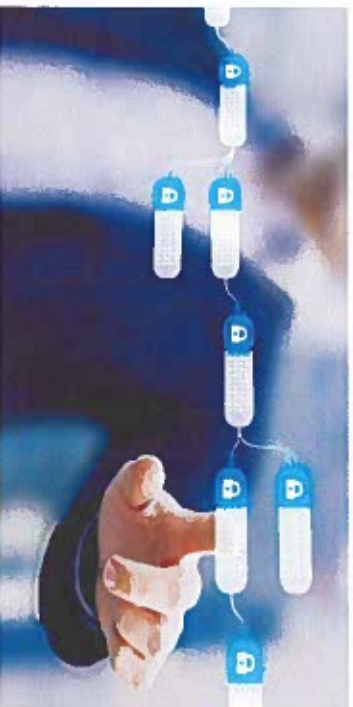
THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL



Members

The vision of our Members:

E4 Carolinas envisions the Carolinas attracting and retaining the world's foremost energy companies, leaders and innovators.



Member-Driven Task Forces:

- Economic Development
- Policy
- Workforce Development
- Communications
- Innovation
- SC Clean Energy Industries

Member-Informed Research:

- Alternative fuel vehicles
- Grid Hardware
- Green Hydrogen
- Advanced Nuclear Technologies
- Workforce Diversity
- Energy Awareness



Task Forces

WORKFORCE DEVELOPMENT

Emerging & Executive Leadership programs
Leadership Alumni Network
Energy Bootcamp

ECONOMIC DEVELOPMENT

Alternative Fuel Vehicles
Hydrogen
Grid Hardware
Energy Storage

POLICY

Washington D.C. Fly-In
Energy Briefings and
Updates
Energy Policy Summit



INNOVATION

Digital Technology Webinars
Innovation Conference & Seminars
Energy Risk Management

COMMUNICATIONS

Energy Communicators Network
Energy News Weekly
Member Networking Events

SC CLEAN ENERGY INDUSTRIES

SC Clean Energy Legislative/Regulatory Update
SC Clean Energy Conference
Southeast Energy Law Seminar



US Department of Energy Grants



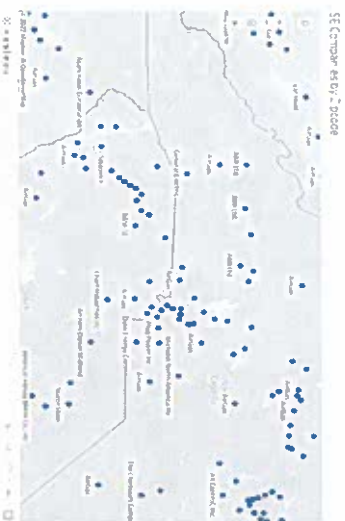
AFVs & STORMS

Project will enhance Carolinas alternative fuel vehicles (AFVs) fueling & fleet and resilience through planning for the use of AFVs for storm evacuations & emergency response.



ENERGY HARDWARE CLUSTER

Project will create a regional energy hardware cluster innovation & accelerator ecosystem to enhance commercialization opportunities for energy startups & new ventures originating within an established company.



GREEN HYDROGEN

Project will identify the green hydrogen energy value chain in the Southeast Region & opportunities for green hydrogen to serve existing and new markets.

US Department of Commerce Grant



ADVANCED NUCLEAR TECHNOLOGY ECONOMIC DEVELOPMENT

Project will create a plan for the creation of public-private partnerships, high-quality jobs & capital investment through the advanced nuclear technology industry.



Corporate & Philanthropic Grants



CAROLINAS HBCU ENERGY LEADERSHIP PATHWAY

Ground-breaking and transformative program to promote energy careers to HBCU students in order to increase diversity, racial equity and inclusion in the region's energy workforce.



KEEPING YOU ENERGIZED

Project will produce a resource platform containing short "stories" describing the electric power system and utility business models that have evolved and operate today.





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THANK YOU!

www.e4carolinas.org